View in browser

FinancialPlanning

Wealthtech Weekly

February 27, 2025

By Rob Burgess
Reporter

I'm very excited to head to Dallas next week to attend the Technology Tools for Today (T3) Conference for the third year. I spoke with Joel Bruckenstein, T3 president, about what to expect from the theme of organic growth. It's always a valuable, jam-packed event and this time looks to be no different.

Will I see you there? Let me know what topics you're most interested in — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Organic growth to take center stage at T3 conference

One of the marquee annual events of the wealth management industry, the Technology Tools for Today (T3) Conference is scheduled for March in Dallas.

- **AI scams are getting harder to spot. How advisors can help**
  The tactics of the criminals who utilize AI are changing fast. However, there are also practical steps advisors can take.
- **Value versus growth stocks: How advisors are guiding clients**
  Dividend strategies can provide steady returns over time with less volatility, but growth-oriented stocks can also be an attractive option.
- **Helping clients choose between DAFs and private foundations**
  The best charitable-giving strategy for a client depends on several factors, including the amount in the fund and how involved the client wants to be.
- **Keeping the kids: An advisor's guide to retaining next-gen clients**
  The Great Wealth Transfer is on the horizon, but most advisors say they have only limited interactions with the children of clients.

Read the latest in Wealthtech

FINANCIAL PLANNING

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our Email Preference Center.

Arizent
360 Madison Avenue, 8th Floor
New York, NY 10017

About | Subscriptions | Contact | Privacy Policy

Have questions or concerns? Contact Support

Follow us in real time: